

PLAIN LANGUAGE MATERIALS DEVELOPMENT CHECKLIST

GOAL: The ability to communicate and explain research in plain language is a critical skill. Plain language is a clear way of sharing information that people can understand the first time they read or hear it.¹ This tool aims to support a systematic review of your material to ensure it follows plain language guidance and meets the needs of your intended audience.

HOW TO USE: If this is your first time using the tool, read through the entire checklist and review the guidance before you begin assessing the material. Then, follow the two steps outlined below.

Step 1: Clearly state the audience for this material, the communication need, and the purpose of the material.

Step 2: Complete the checklist in each of the following tables. For any item with a “no” response, consider revising the material.

- 1) **Understandability:** Ensure materials are *understandable*, meaning people of diverse backgrounds and varying levels of health literacy can process and explain key messages.
- 2) **Actionability:** Ensure material is *actionable*, meaning consumers of diverse backgrounds and varying levels of health literacy can identify what they can do based on the information presented.
- 3) **Cultural Relevance:** Ensure material uses language and examples that would be familiar to the intended audience(s) and that it does not perpetuate stereotypes.

Step 1: For this communication material, clearly state below:

Who is the audience?

What is the communication need?

What is the purpose of this material?

¹ <https://mrctcenter.org/health-literacy/tools/overview/plain-language/>

Step 2: Complete the tables below:

Understandability

	Item	Guidance
Content		
<input type="checkbox"/> Yes <input type="checkbox"/> No	Clearly conveys purpose	Make sure that the main message is clear, and stated at the beginning. Think of this as the most important point for the audience to remember after reading or hearing the material.
<input type="checkbox"/> Yes <input type="checkbox"/> No	Does not include content that distracts from the purpose	Include need-to-know information only — skip the nice-to-know details. The idea is to focus on key information readers need to take action. Ask yourself whether any of the information would distract or overwhelm you if you were unfamiliar with the topic.
Word Choice & Style		
<input type="checkbox"/> Yes <input type="checkbox"/> No	Uses common, everyday language. Medical terms are used only to familiarize the audience with the terms, and when used, are defined	Use plain language that everyone can understand (e.g., “high blood pressure,” not “hypertension”). When unfamiliar terms are necessary, explain them in context and provide an in-text definition using simple language. For example, a reader just diagnosed with diabetes probably needs to learn the term “glucose.” Ask yourself whether you’d understand all of the terms in the material if you didn’t know anything about the topic.
<input type="checkbox"/> Yes <input type="checkbox"/> No	Uses active voice	Use primarily the active voice and avoid passive voice. Ask yourself: Is the subject of the sentence doing the action (e.g., “experts recommend that you get a flu shot”)? If so, the sentence is written or spoken in the active voice. Avoid sentence structures that position the subject receiving the action (e.g., “getting a flu shot is recommended by experts?”). That’s passive voice.
Organization		
<input type="checkbox"/> Yes <input type="checkbox"/> No	Breaks or “chunks” information into short sections	Divide content into short chunks of information with informative, clear headers. Think about whether you can quickly scan to find the information you’re looking for. Does the amount of content in each section seem manageable, or is it overwhelming?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Uses simple sentence structure	Use short, simple, and direct sentences (8-15 words each). Avoid complex use of parentheses, commas, and semicolons.

Layout & Design		
<input type="checkbox"/> Yes <input type="checkbox"/> No	Uses visual cues to draw attention to key points	Signal where to find important information and use visual elements such as arrows, boxes, bullets, bold, and larger font to add emphasis. Scan the material and ask yourself: Is it clear where you'll find key takeaways before you even read the words? Use these visual cues selectively — they can be less effective if they're overused.
Visual Aids		
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Uses visual aids that support the main message and represent the intended audience (score only if material includes visual aids)	Visual aids like photos and graphics can make health education materials easier to understand, more engaging, and more relatable. Think about whether the material's visual aids could help the intended audience understand the content better or help them relate to the material. For example, in a material with a main message about taking steps to prevent lead poisoning in children, a photo of peeling paint in an older home could help readers understand what to look for. Visual aids should reinforce rather than distract from the content. Keep in mind that almost all health education materials can benefit from visual aids.
Use of Numbers		
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Uses numbers that are clear and easy to understand (score only if material includes numbers)	<p>Use whole numbers rather than fractions and decimals. Keep in mind that frequencies (e.g., 3 out of 10) are generally easier to understand than percentages (e.g., 30%). Use numerals (e.g., 3, 2nd) rather than spelling out numbers (e.g., three, second).</p> <p>Context for numbers — in the form of words or additional numbers, like a range — can also indicate clear use of numbers. So can visual metaphors (e.g., "1 ounce of cheese is about the same size as 3 dice").</p> <p>Always do the math for the readers. Make sure the material doesn't ask them to add, subtract, multiply, or divide.</p>

Actionability

	Item	Guidance
<input type="checkbox"/> Yes <input type="checkbox"/> No	Clearly identifies at least one action the user can take	For the user to take action, the material needs to clearly identify at least one action.
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Addresses the user directly when describing actions	To help the user know what actions they should take, address the user directly in the second person. For example, use "you can find it at your drugstore" instead of "patients can find it at their drugstore."

<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Breaks down any action into manageable, explicit steps	Tell the user how to take action, especially if the action is big or broad, such as “increase exercise”. Do not use ambiguous terms that can be left to interpretation (e.g., frequently, regularly, strong, weak).
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Uses visual aids whenever they could make it easier to act on the instructions (score only if material includes visual aids)	Include a visual aid if it could make it easier to act on the instructions or information presented. For example, if the content includes instructions on how to check your blood sugar, one or more images depicting how a person obtains a blood sample from a finger could help readers understand how to take action.

Cultural Relevance

	Item	Guidance
<input type="checkbox"/> Yes <input type="checkbox"/> No	Uses language and examples that would be familiar to the audience(s)	Ensure that language and examples of activities, foods, etc. are familiar to the audience.
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Uses visual aids that are diverse in terms of relevant race, ethnicity, age, gender, ability, and other characteristics (score only if material includes visual aids)	If visual aids are included, ensure that the people included are diverse and reflect the intended audience. Similar to the item above, any visual aids of activities, foods, etc. should be familiar to the audience.
<input type="checkbox"/> Yes <input type="checkbox"/> No	Avoids perpetuating stereotypes	Consider whether any language, examples, or images used in the material could unintentionally perpetuate stereotypes. For example, when depicting parents, gender representation should not be limited to just women.

HELPFUL RESOURCES:

- The MRCT Center of Brigham and Women’s Hospital and Harvard’s [Health Literacy in Clinical Research](#) website includes a variety of plain language resources and a clinical research glossary.
- [Plainlanguage.gov](#) includes information on the federal plain language guidelines and examples of various governmental communications.
- The Center for Disease Control and Prevention’s [Clear Communication Index User Guide](#) offers examples of plain language alternatives to replace jargon words.
- The Center for Disease Control and Prevention’s [Health Equity Guiding Principles for Inclusive Communication](#) includes guidance on selected inclusive images and preferred terms for select population groups & communities.

- [Harvard's Digital Accessibility Policy](#) includes steps you can take, such as tagging your document with headings, being mindful of color, and using mindful formatting techniques that will make your document accessible to more people.
 - [Accessibility Testing Tools and Practices](#)
 - [How to make your PDF accessible](#)
 - [How to make your Word document accessible](#)

CONTENT IN THIS CHECKLIST WAS ADAPTED FROM:

- National Library of Medicine's [Health Education Materials Assessment Tool](#)
- Agency for Healthcare Research and Quality's [Patient Education Materials Assessment Tool \(PEMAT\) and User's Guide](#)
- The Center for Health Guidance's [Health Literacy Principles Checklist](#)